

E- TUG MINUTES: CORPORATE SPONSORSHIP AND QUICKSALE

Date: 9 October 2015

In Attendance: Gwen Horvath, Lauren Hyatt, Joanne Madeley, Beth Hawryluk, Danielle Dolgoy, Megan Bertagnolli, Emma Ingen-Housz

Time: 1 PM

Absent: Lauren Tenney, Tix on the Square, Catherine Szabo, Celyne Runzer

Meeting location: AGA

Quick sale presentation:

- Alternative to order details screen.
- You can populate it with memberships, parties i.e. Current events
- When you click on it, it brings up price point
- Good for managing members: you can add a member, see if memberships are expired, donations made and levels of membership
- Quick way to give you method of payment, quicker way to get orders through
- How to get it: go to ticket set up, sales layout and then you can set up different types of quick sale screens.
- You then populate it with the events and ticket prices that you want to include: you limit the events to a specific timeline and price point
- The buttons that you need in this screen will populate automatically according to the parameters of your event
- You always have the add and edit functions to further customize these
- Question: Can this be used in a barcode system? AGA does not use barcodes, but in theory they should work.
- Is this useful for tix with the amount of events that they have simultaneously? Maybe doing it this way will allow sales to have current shows in drop down instead of having to sift through all of them.
- Opera has fewer shows so do not feel it necessary to change to this system.

Corporate investment and Plans

- Plans are used by the development team to track potential and current donors
- Deliverables: Track , maintain and report
 - o Brand recognition (ticket design, signage, website)
 - o Ticket Discount : promo codes
 - o Tickets and hosting: comp. tickets, designated giveaways, private tours etc.
 - o Other: Business receipts, Display areas in lobby, annual or quarterly progress.

You can create the corporation type and constituent record and then affiliate it with individuals.

- Corporate plans:
 - o Useful for an at a glance view of all the important steps involved in stewarding corporate sponsors and gives you a quick status update of where you are with this specific sponsor.
- Plan type drop down:
 - o Customize field: you can indicate the intent or time frame of sponsorship.
 - o The Plan status is also customizable. As workers cultivate the sponsorship –the status is updated. **This is a reportable field.**
- Assign Workers
 - o Plans can be assigned to as many workers as you choose. Only one person can be the Primary: they have the ability to assign plans to many portfolios.
- Steps
 - o Used to identify sponsorship receivables and deliverables as outlined by their agreement and the status of those items individually.
 - o You can set deadlines for each of the steps in your plan.
 - o Each individual step can be assigned its own associated contact, worker and applicable dates.
 - o It is important to set up parameters around the step description as it is free text: Free text fields are not a reportable parameter but can be included in results of certain reports .Having an established format can assist with the creation of custom reports in the future.
 - o Plan steps: you can create reminders for yourself or other tessitura users. The assigned worker on a plan step does not have to be assigned as the worker to the plan- but does have to be a tessitura user. There is a way that you can link tess. Reminders to your outlook.
 - o When you are within the scheduled warn days, your reminders screen will populate with the appropriate plan steps that are assigned to you.
 - o Workers assigned to the plan with a portfolio can access all their plans as a list in the portfolio screen of their constituent record. This screen is customizable

Tracking Events:

- o Activities: Sponsorship deliverables that could be categorized as events can be booked as activities. We can schedule and maintain these deliverables and manage attendance here.
- o Donations: as money is pledged, we can create a contribution tab that is attached to the plan on the corporate account.
- o Development: You can create team codes and set highly specific goals. A plan is beneficial to development because of the reportability capabilities. This is a place where files are updated in real time and by looking at it- it can give everyone a good idea of where people are at in any specific task.

Questions/comments:

- How do you track the sizes of ads and incorporate them into a drop down list?
- Right now- all the info for ads exists in excel.
- Putting everything into Tess takes a lot of time—initially. But once in, the info can be used to pull reports that you cannot pull from excel.
- It will take a lot of labour power to collate this data as they primarily exist in CSI's at the moment.
- When using plans, consistency within the team is extremely important. The nice thing about plans is that it holds people accountable and allows the team to be accountable and responsible for different aspects of the plans.
- A pro with the data entry is that you will have a chance to get to know the groups you are dealing with very well- their history, your goals for them etc.
- We will complete a survey about what topics we would like to cover.
- There was a suggestion of something like a mini- TSAT training summer camp.

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